PEDS Data Entry Training
Client Report

Statewide Data Collection and Evaluation of First 5 California Funded Programs

FIRST 5 CALIFORNIA

7/11/06

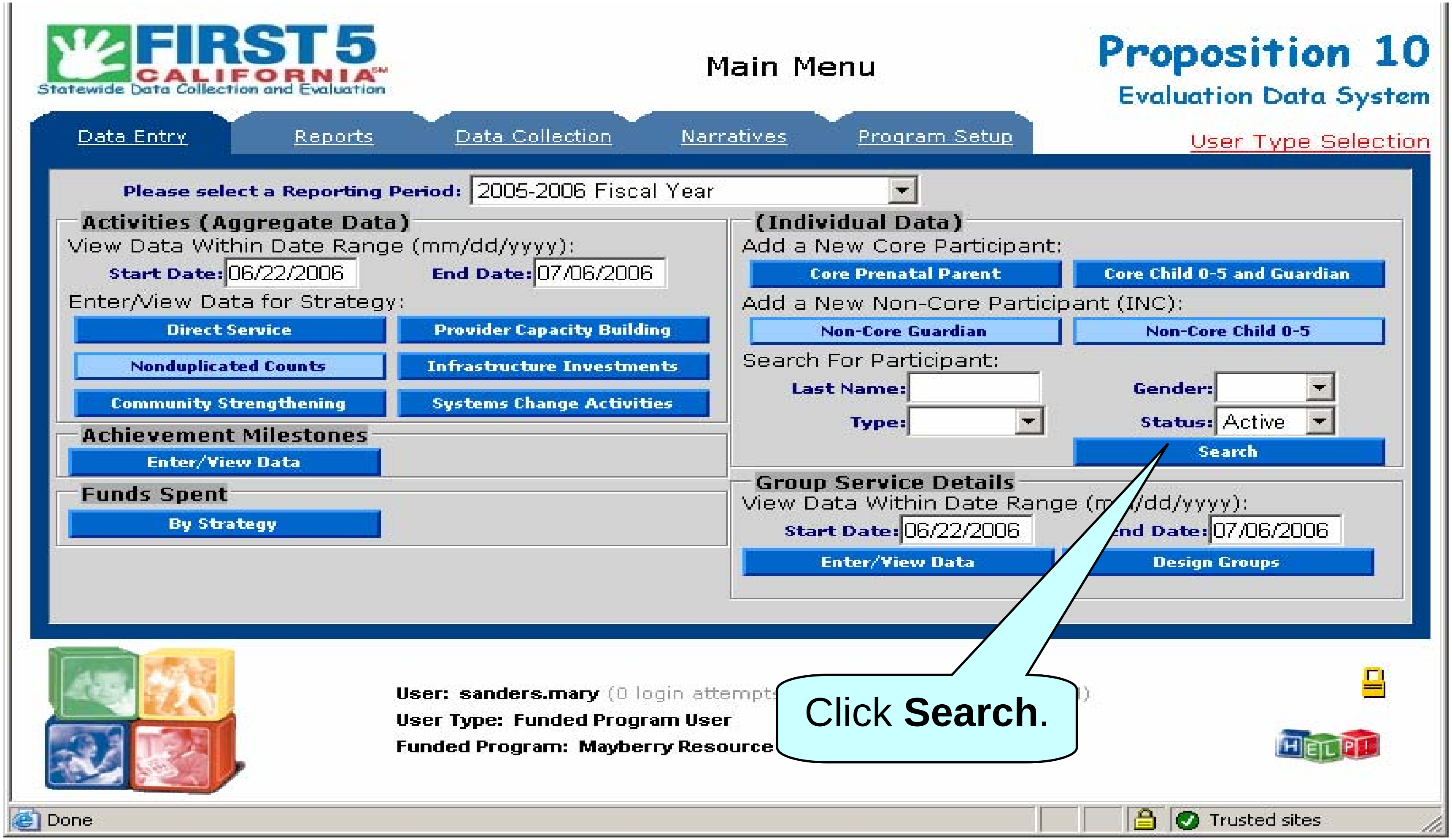
Goals of Training

- To describe the content and uses of the client report.
- To learn how to run the client report in PEDS.
- To learn how to use the client report filters.
- To learn how to print, save, and export the client report.

Client Report
Examples of uses

- Provide case managers with a client’s history.
- Display a client’s intake/follow-up schedule.
- Display a client’s intake/follow-up history.
- Display services received by a client.

How do I access the Client Report?



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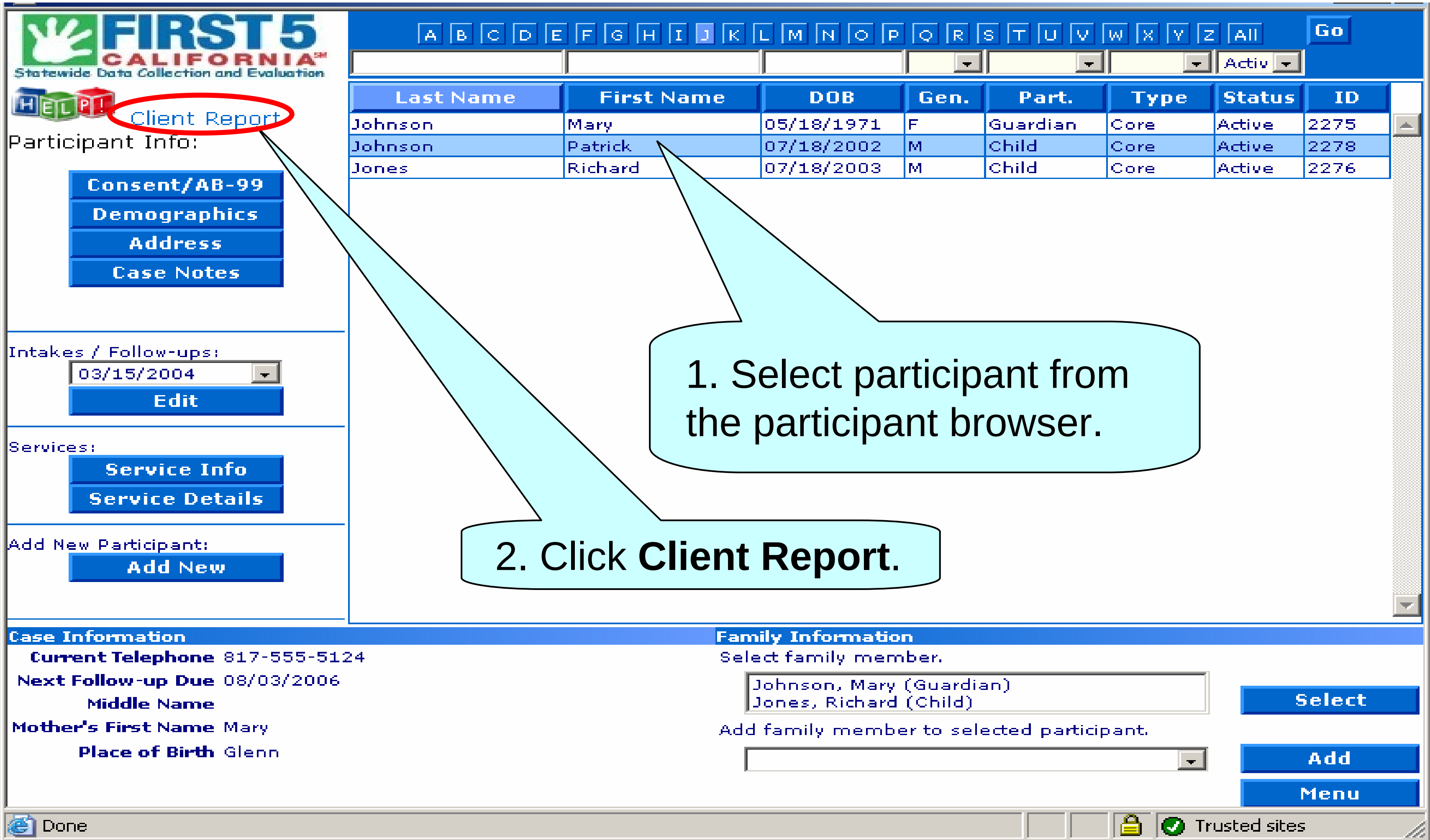

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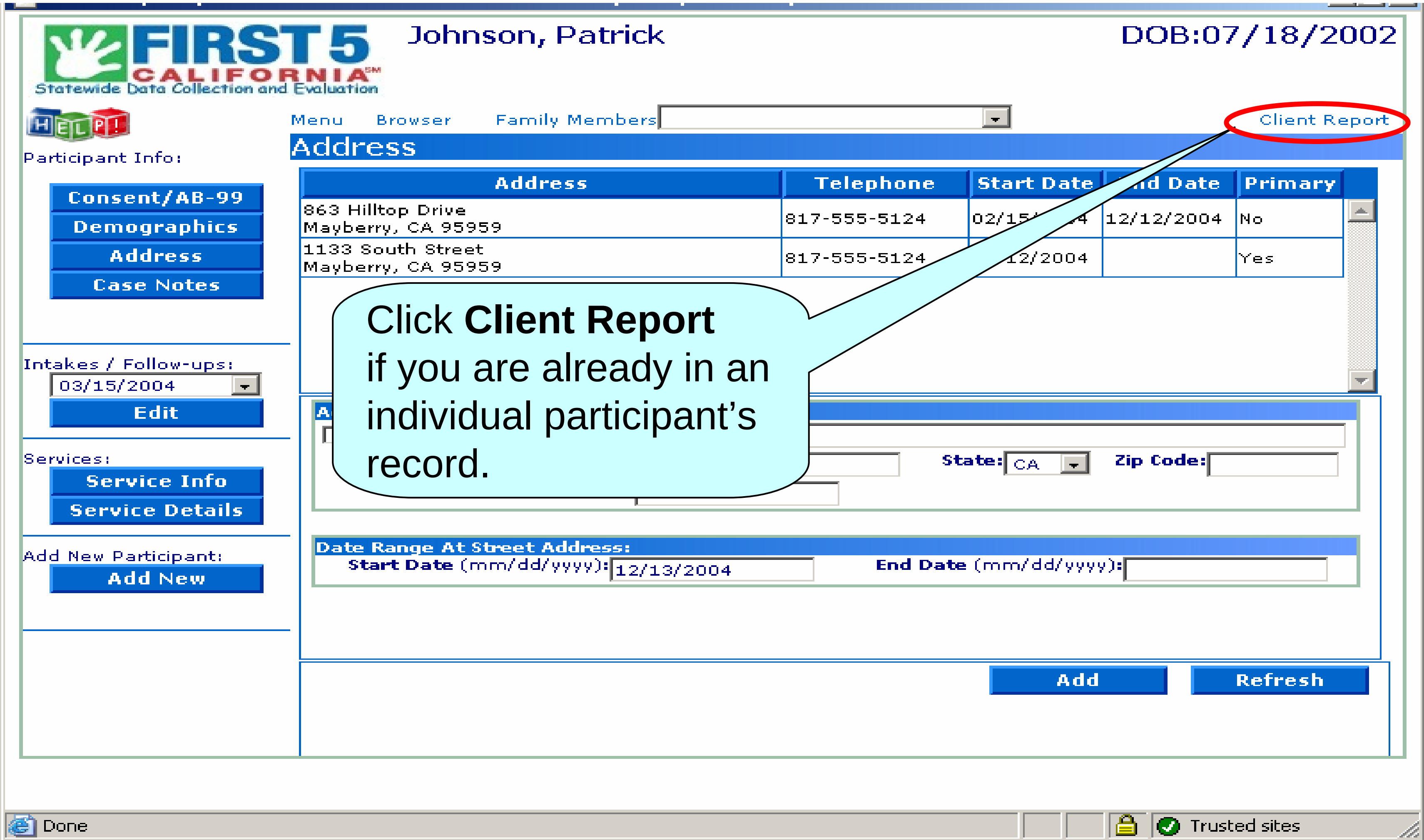
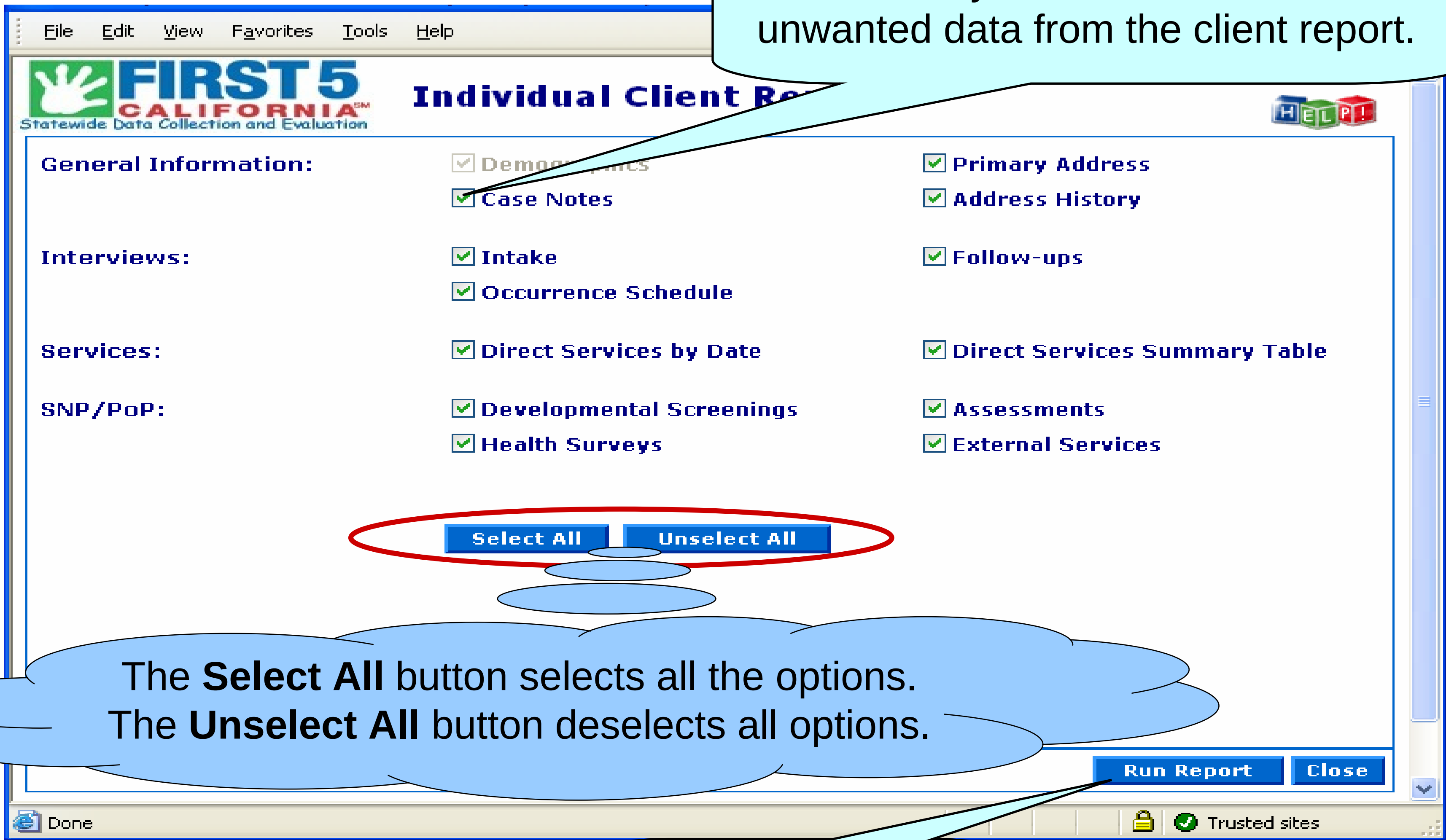


Client Report
Report filters

Deselect any check box to exclude unwanted data from the client report.

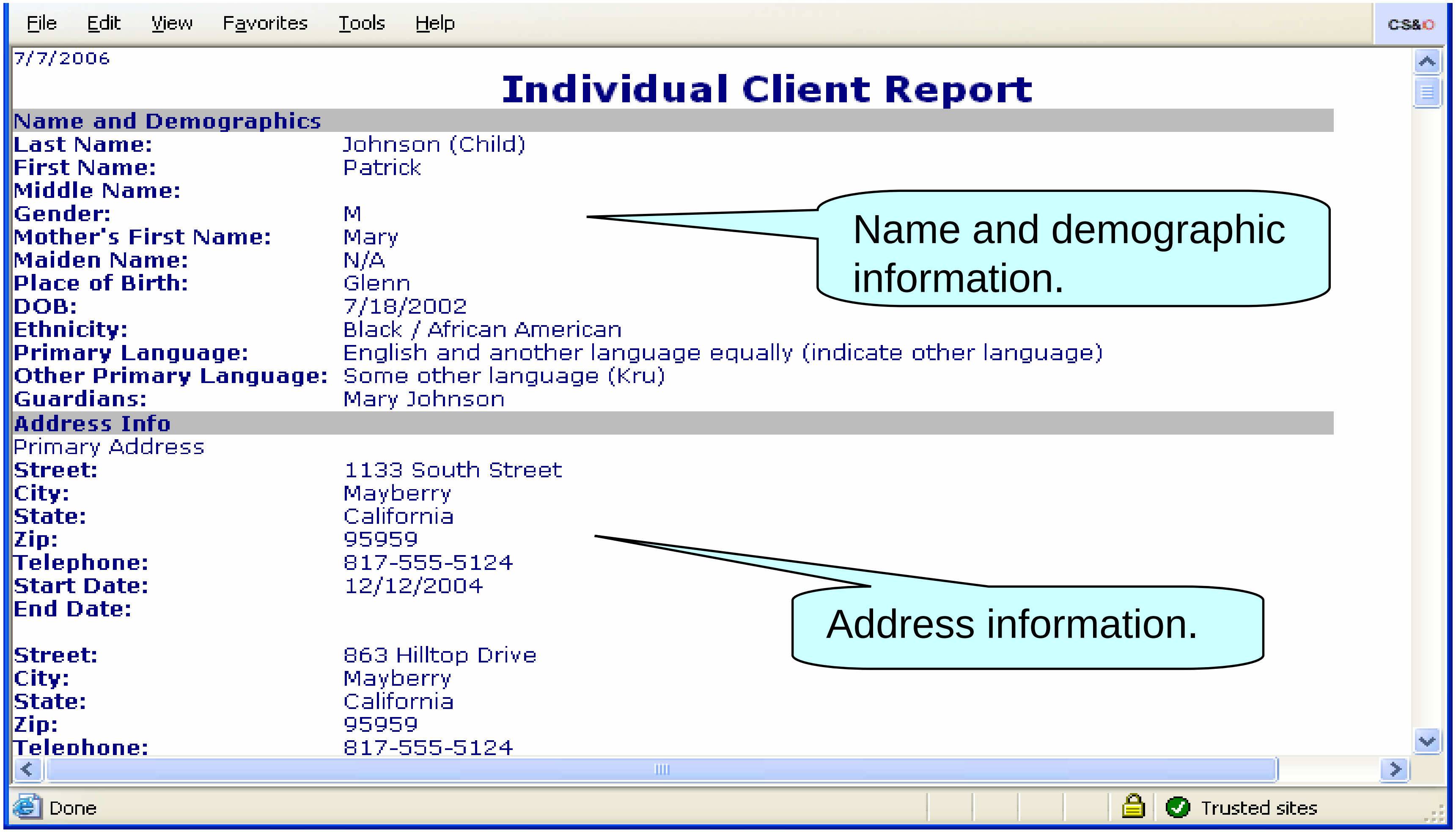


The **Select All** button selects all the options.
The **Unselect All** button deselects all options.

Click **Run Report**.

Client Report

Client report sections



7/7/2006

Individual Client Report

Name and Demographics

Last Name:	Johnson (Child)
First Name:	Patrick
Middle Name:	
Gender:	M
Mother's First Name:	Mary
Maiden Name:	N/A
Place of Birth:	Glenn
DOB:	7/18/2002
Ethnicity:	Black / African American
Primary Language:	English and another language equally (indicate other language)
Other Primary Language:	Some other language (Kru)
Guardians:	Mary Johnson

Address Info

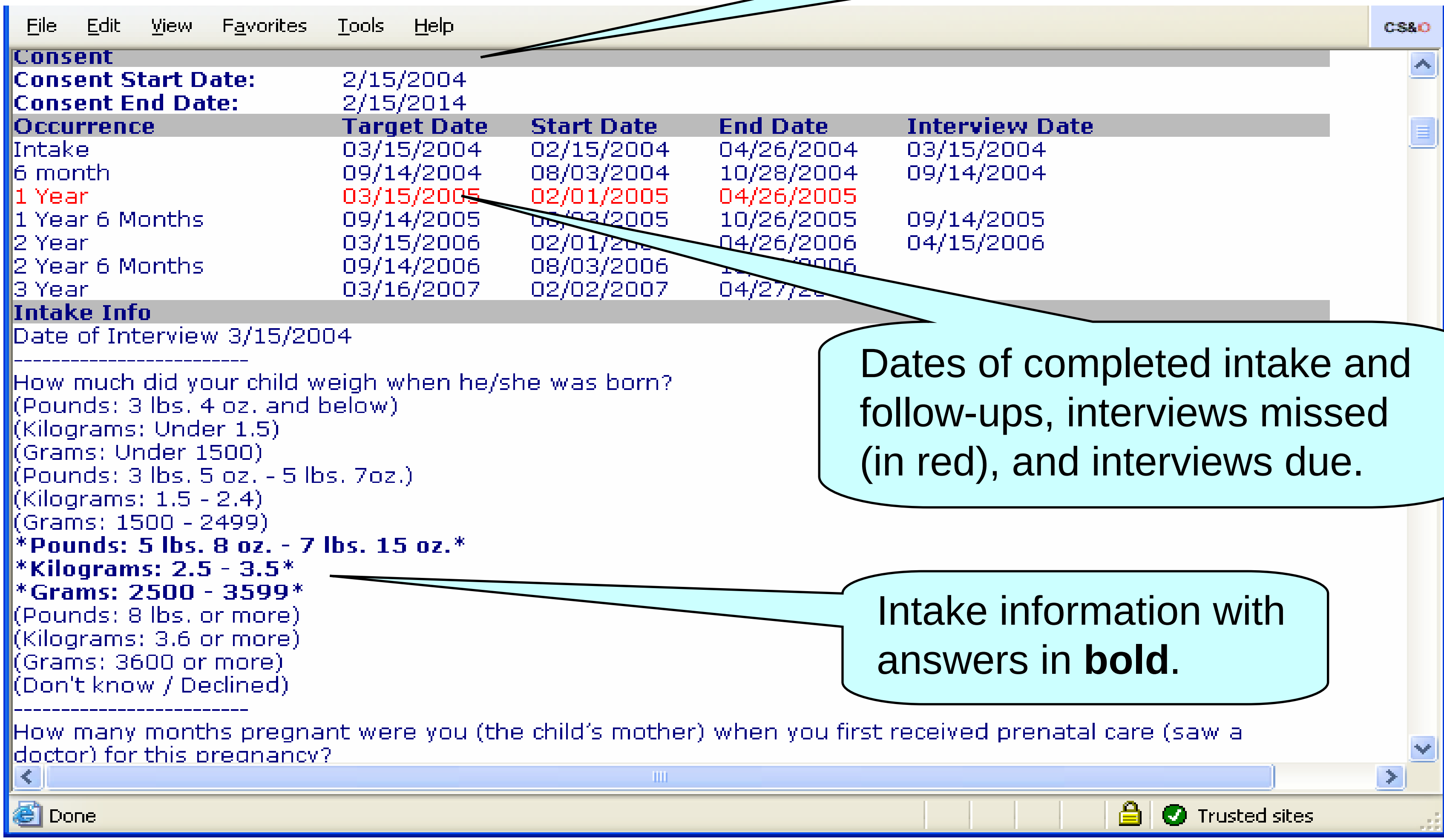
Primary Address

Street:	1133 South Street
City:	Mayberry
State:	California
Zip:	95959
Telephone:	817-555-5124
Start Date:	12/12/2004
End Date:	
Street:	863 Hilltop Drive
City:	Mayberry
State:	California
Zip:	95959
Telephone:	817-555-5124

Client Report

Client report sections

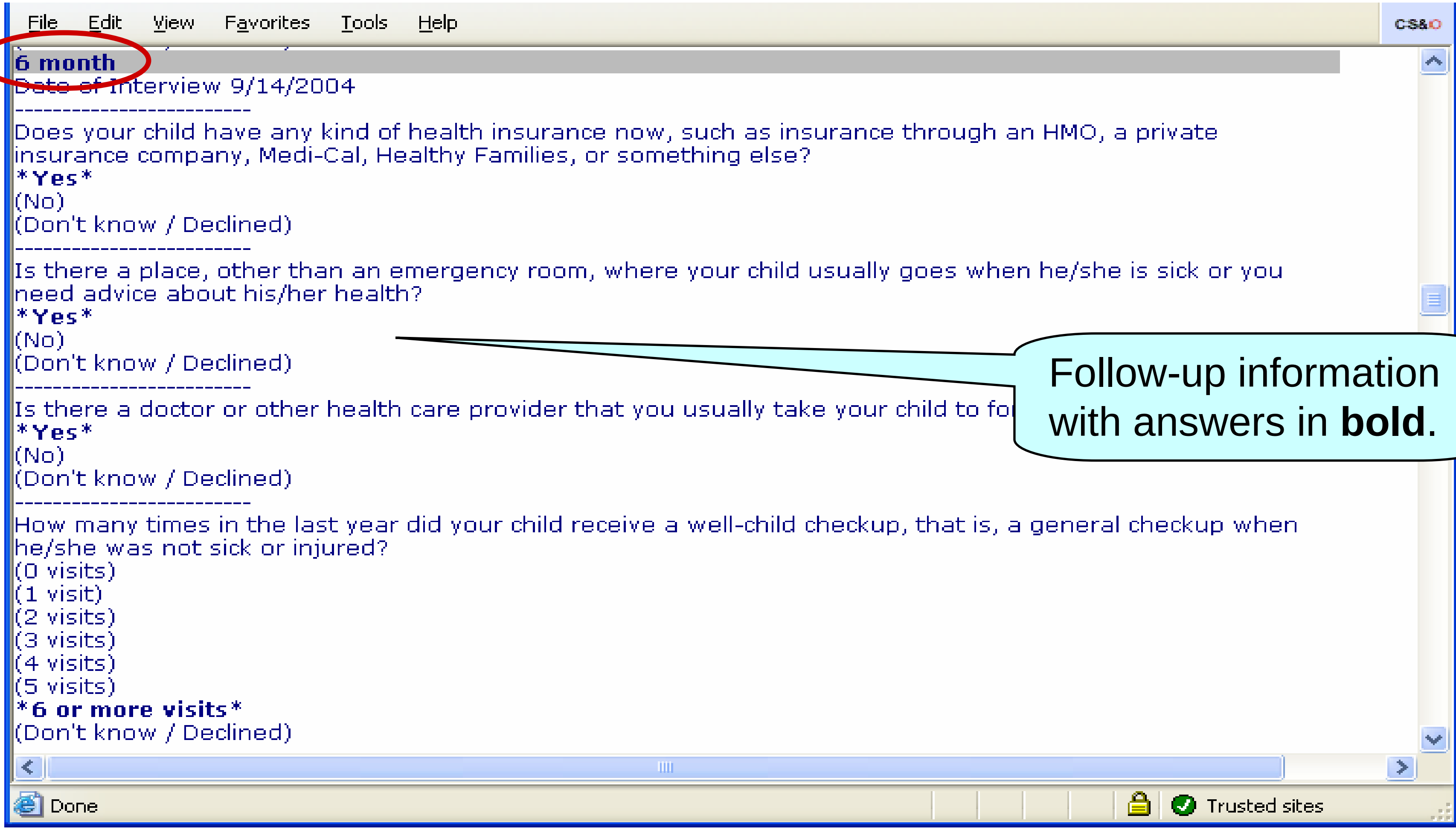
Consent start and end date.



Dates of completed intake and follow-ups, interviews missed (in red), and interviews due.

Intake information with answers in **bold**.

Client Report Sections


File Edit View Favorites Tools Help

6 month
Date of Interview 9/14/2004

Does your child have any kind of health insurance now, such as insurance through an HMO, a private insurance company, Medi-Cal, Healthy Families, or something else?
Yes
(No)
(Don't know / Declined)

Is there a place, other than an emergency room, where your child usually goes when he/she is sick or you need advice about his/her health?
Yes
(No)
(Don't know / Declined)

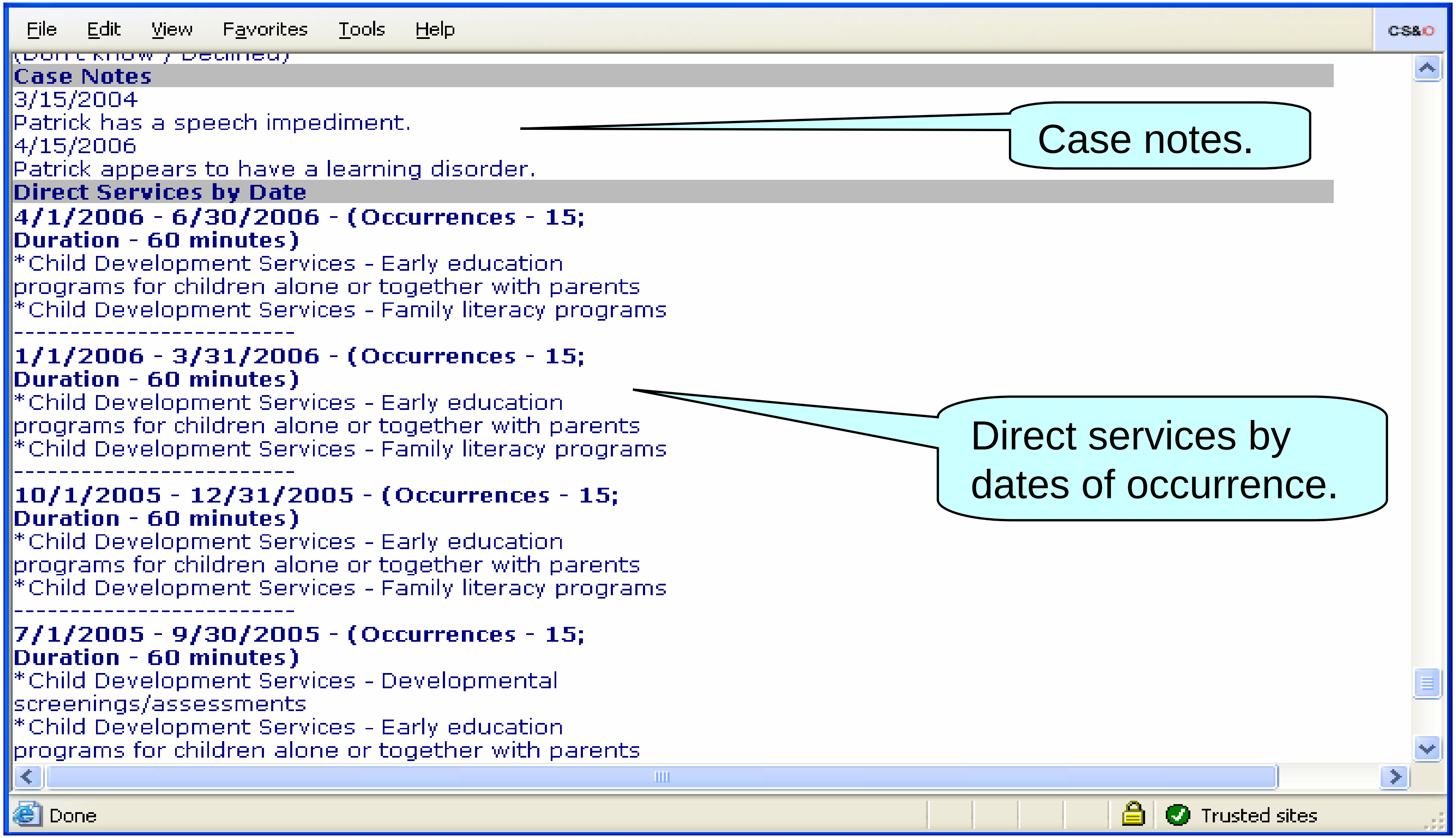
Is there a doctor or other health care provider that you usually take your child to fo
Yes
(No)
(Don't know / Declined)

How many times in the last year did your child receive a well-child checkup, that is, a general checkup when he/she was not sick or injured?
(0 visits)
(1 visit)
(2 visits)
(3 visits)
(4 visits)
(5 visits)
6 or more visits
(Don't know / Declined)

Done
Trusted sites

Follow-up information with answers in **bold**.

Client Report Sections



Client Report Sections

Direct services summary table.

File Edit View Favorites Tools Help

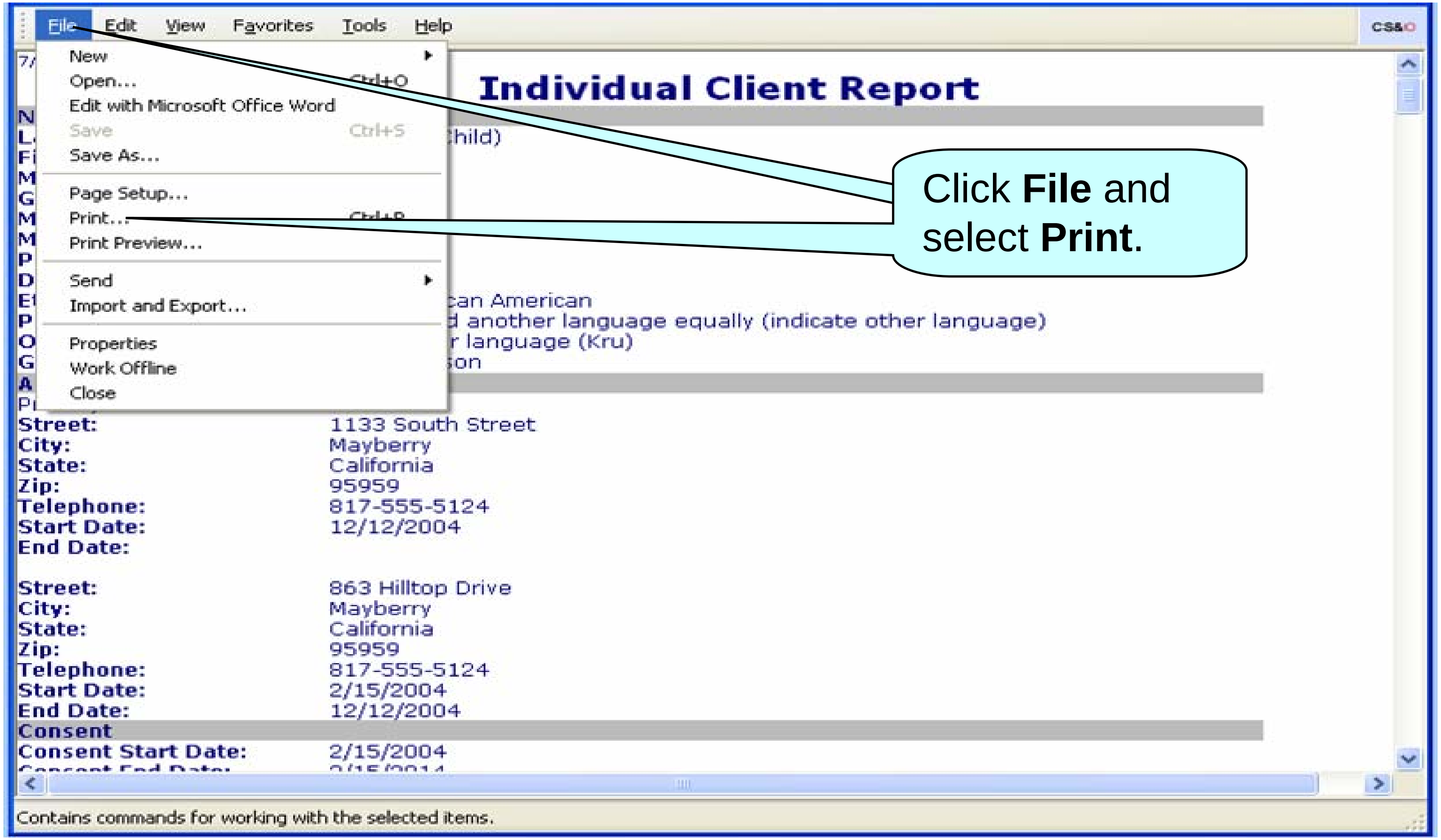
Direct Services Summary Table

Direct Service Activities	**Service Units Provided**										
	Case management	**Home visit**	**Mobile service**	**In-person consultation/service**	**Support group session**	**Class/workshop**	**Public/community event**	**Phone consultation**	**Mailing/distribution of materials**	**Other**	**Total**
Child Development Services											
Developmental screenings/assessments	0	15	0	0	0	0	0	0	0	0	**15**
Early education programs for children alone or together with parents	0	60	0	0	0	0	0	0	0	0	**60**
Family literacy programs	0	60	0	0	0	0	0	0	0	0	**60**

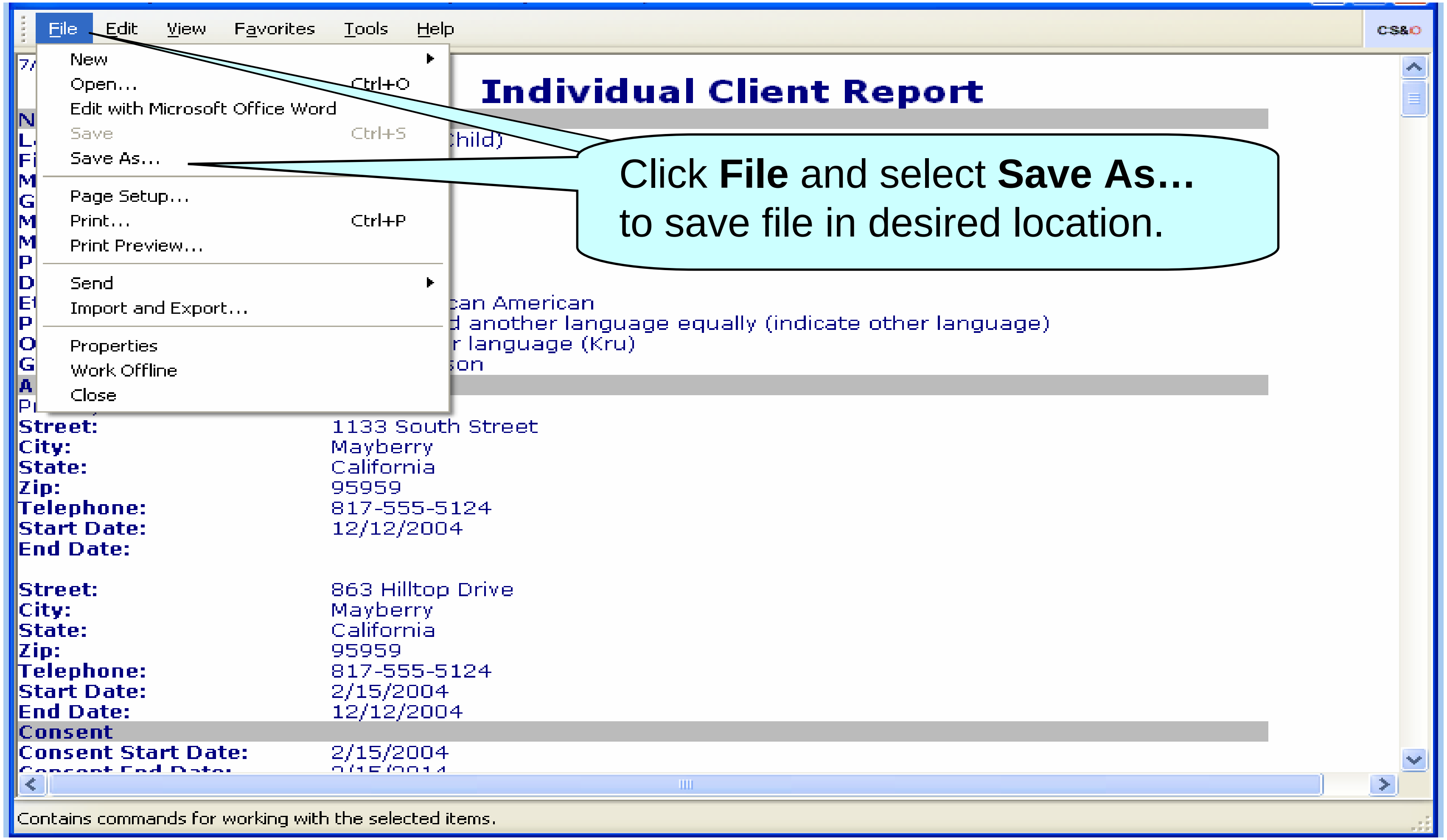
Export to Word

Done Trusted sites

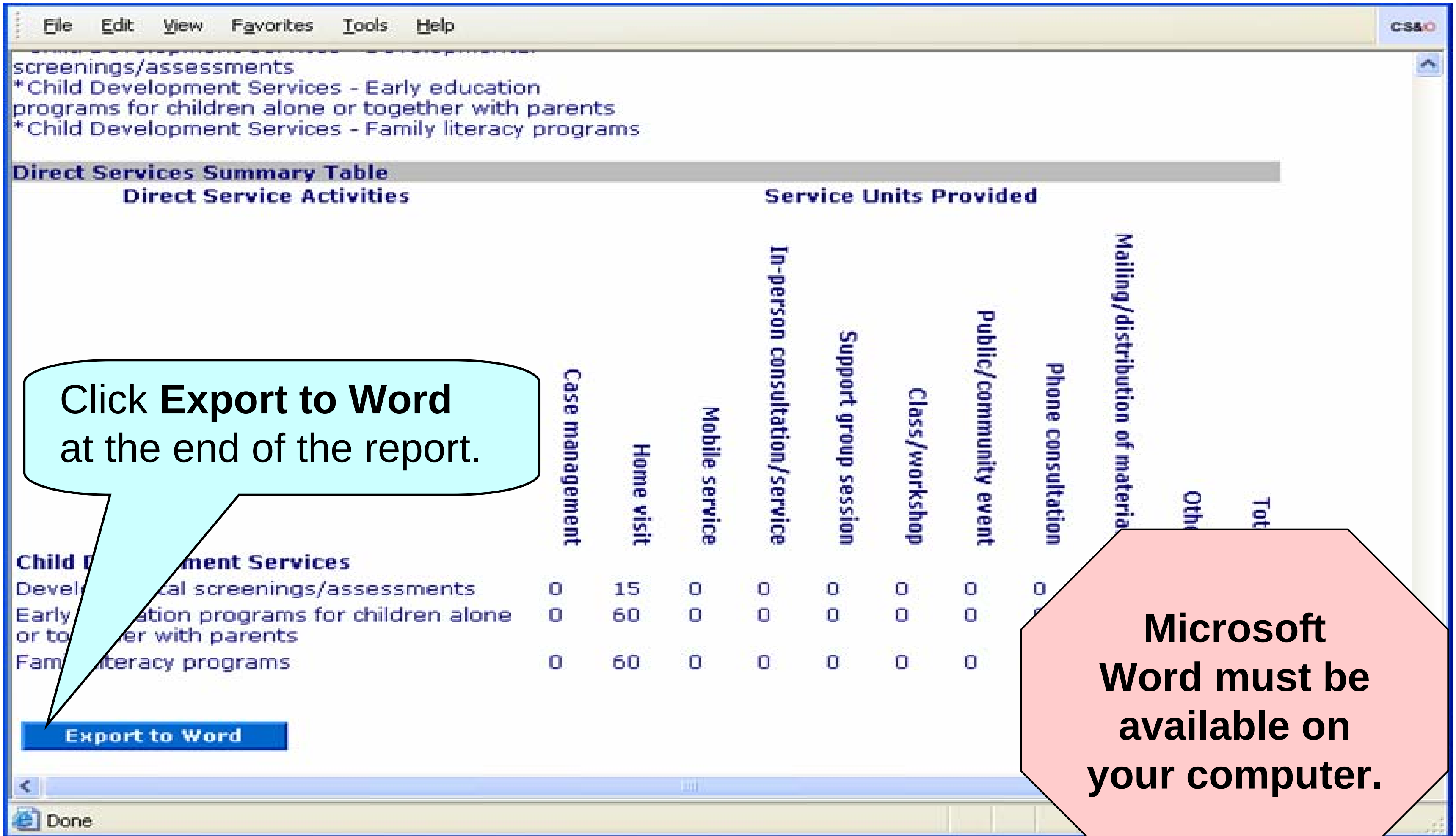
Client Report
Printing a report



Client Report
Saving a report as a file



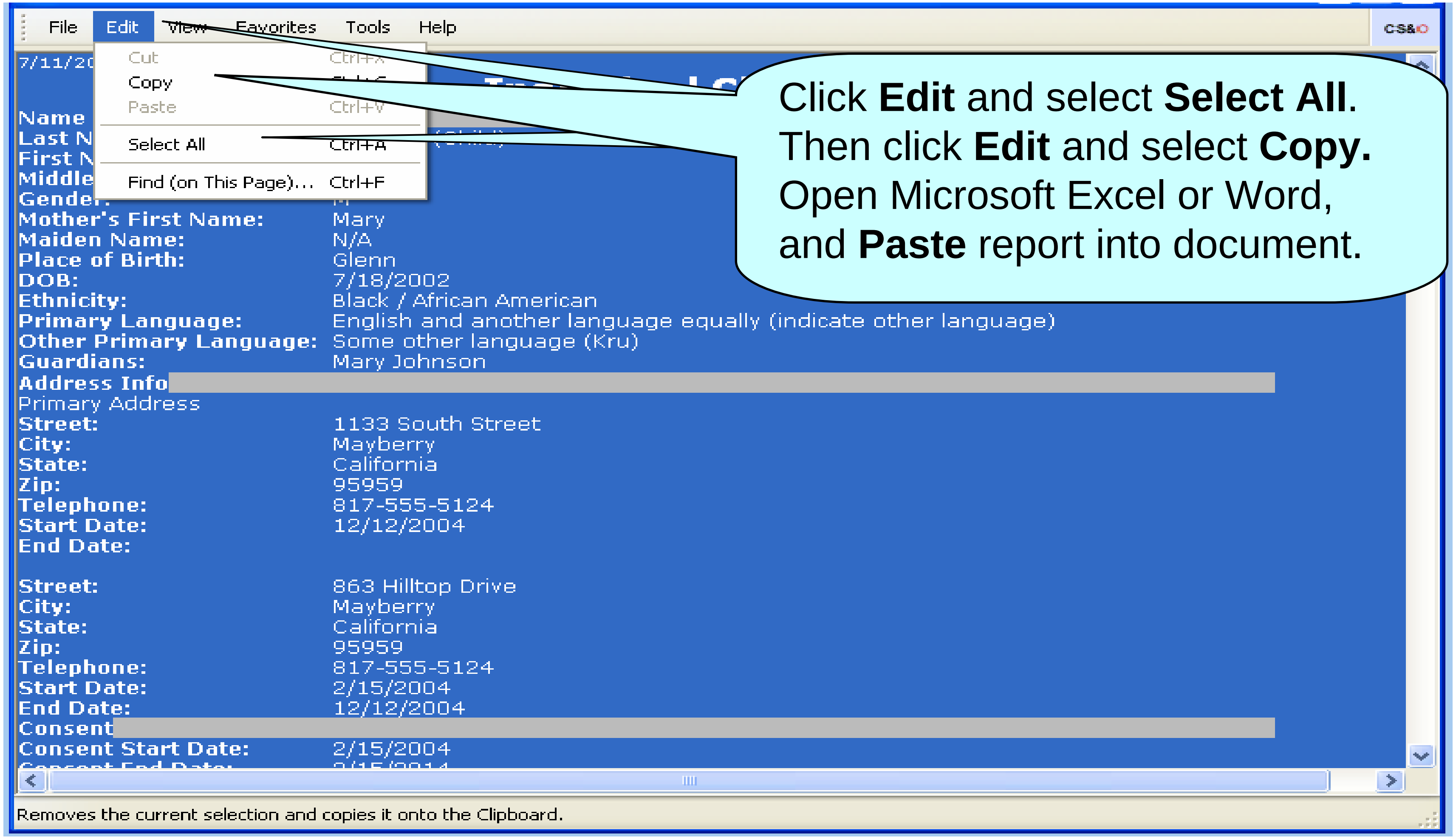
Client Report
Exporting a report to Microsoft Word



Click **Export to Word** at the end of the report.

Microsoft Word must be available on your computer.

Client Report
Copying a report (in lieu of exporting)



Click **Edit** and select **Select All**. Then click **Edit** and select **Copy.** Open Microsoft Excel or Word, and **Paste** report into document.

Client Report
Summary

To Run a Client Report

- On Main Menu, click **Search**.
- Select participant from browser.
- Click **Client Report**.
- Select desired report filters by using the check boxes.
- Click **Run Report**.

To Print a Client Report

- Click **File**.
- Select **Print**.

To Save a Client Report

- Click **File**.
- Select **Save As…**

To Export a Client Report to Word

- Click **Export to Word** at end of report.

To Copy a Client Report

- Click **Edit**.
- Select **Select All**.
- Click **Edit**.
- Select **Copy**.
- Open Microsoft Excel or Word.
- **Paste** report into document.